PUBLIC AFFAIRS, THE SELF-DIRECTED INFORMATION ENVIRONMENT
AND STRATEGIC INTEGRATION

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Information moves faster and through more platforms than ever, while traditional public affairs' responses, tactics and operations are calculated, slow and cumbersome. Using case-studies from the Ukraine, Israel and ISIS, this paper evaluated effective methods of communication in the current information environment. These studies indicated the trustworthiness and emotional appeal of information sources mean as much or more than the origin of the information itself. The research indicated information flows from key influencers through an information environment where end-users pick and choose sources they trust. This self-directed news gathering trend decentralizes information, making it difficult to reach audiences in an effective manner without a plan to navigate through the information terrain. The thesis claims applying public affairs principles strategically, while using language and framework familiar to commanders at all levels, creates opportunities to integrate public affairs into the overall strategic approach.

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ABSTRACT

PUBLIC AFFAIRS, THE SELF-DIRECTED INFORMATION ENVIRONMENT AND
STRATEGIC INTEGRATION, by Maj. Carla M. Gleason, 96 pages.

Military Public Affairs is at a crossroads: Information moves faster and through more
platforms than ever, while traditional public affairs' responses, tactics and operations are
calculated, slow and cumbersome.

Using case-studies from the Ukraine, Israel and ISIS, this paper evaluated effective
methods of communication in the current information environment. These studies
indicated the trustworthiness and emotional appeal of information sources mean as much
or more than the origin of the information itself. The research indicated information flows
from key influencers through an information environment where end-users pick and
choose sources they trust. This self-directed news gathering trend decentralizes
information, making it difficult to reach audiences in an effective manner without a plan
to navigate through the information terrain. These findings highlight the importance of
understanding the nature of the environment and the audience and key influencers in each
domain prior to determining effective communication strategies. It investigates the
strategic value of treating the information realm as a physical environment and using an
operational approach when navigating through information's complex terrain.

The thesis claims applying public affairs principles strategically, while using language
and framework familiar to commanders at all levels, creates opportunities to integrate
public affairs into the overall strategic approach.

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ACRONYMS

DMA	Defense Media Activity
DOD	Department of Defense
IDF	Israeli Defense Forces
IE	Information Environment
IO	Information Operations
ISIS	Islamic State in Iraq and Syria
PA	Public Affairs

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CHAPTER 1

INTRODUCTION

Protests in 2009 and 2010 in obscure regions across the world including places like Moldova, Tehran, Thailand and Tunisia caught international attention like never before, not because of traditional media coverage–though that too was prevalent–but because of individual reporting across individual media platforms like texting, e-mail, blogs, Twitter and Facebook.[1] In 2011, self-driven media attention reached an all-time revolutionary high as multiple regions experiencing conflict saw citizens using this technology in new and extremely effective ways.[2] The people caught on quickly to this brave new world of instant information, straight from the source individual reporting and communities of shared experience. But could the organized states follow suit? Recent examples show they can. Russian president Vladimir Putin's army of experienced, state-employed Internet trolls spend hours using slick, state-sponsored social media campaigns to exploit everything from individual attacks on global leaders to smear campaigns against the U.S. and allied nations.[3] Even entities previously thought to be too disparate to organize this type of mass-propaganda effectively, like the Islamic State in Iraq and Syria (ISIS), have mastered the art of controlling the narrative in such a way that their effectiveness rivals that of the developed West.[4] What, then, is the role of military public affairs (PA) in this new media environment?

This paper will review research gathered on the strategic use of PA in the current Information Environment (IE) and present evidence from case studies. By analyzing how military and state entities use these tools globally compared to the United States today,

this paper will examine best practices, strategic failures, and recommendations for future PA integration into the strategic environment.

Background

Global military operations are undergoing an evolution in the information domain. Though not yet fully understood from a military strategic perspective, the introduction of social media strategies into information operations (IO) and PA campaigns is an outcropping of this development. By exploring the psychology behind the information domain paradigm shift, the various societal responses to this shift and the best and worst practices from recent case studies, commanders will be better able to craft strategic uses for PA operations in a meaningful way.

In order to understand why the evolving IE is more than a technological phenomenon, you have to look at the human psychology behind why these sites are such a powerful motivator for human behavior. Traditionally, new and sophisticated military technology is expensive and, thus, relegated to state actors or wealthy instigators. The web, however, is different. Internet access is inexpensive, easy to use and global. It provides individuals with a platform to express ideas and a method to discover information on their own terms. People and individual stories have the power to drive the narrative like never before.

Historians, when discussing military paradigm shifts, talk in terms of revolutions in military affairs.[5] This refers to new technological advances in weaponry, shifts in doctrine or population centers or philosophical attitudes toward war and battle. The problem with viewing military evolution in this manner, however, is it's hard to pinpoint the effects of change when you are operating during the transition, inside the eye of the

storm if you will. Military IO are undergoing just such a shift. This paper will endeavor to determine how commanders not only recognize the components of this evolutionary shift, but integrate these concepts into a strategic framework and operate effectively in the midst of it.

Today, with the technological advancements of the last 15 years, it is not only the media environment which is evolving, but it is also the media itself. Media has always been a powerful tool in emerging democracies and developed societies. In its purest form, the media documents events, gives a voice to both the dominant and the week indiscriminately and keeps the actors honest. At its most distorted, the media becomes a powerful tool for propaganda, misinformation and dissent. Until recently, the media landscape of the developed world lay somewhere in between. In 1997, the prominent thought concerning the media and the military relationship was "The U.S. military needs the media to tell the military story to retain public support."[6] That paradigm has been integrated far into PA thinking and training, and the 24-hour news cycle continues to dominate main-stream military thinking and training. The problem is the 24-hour news cycle no longer exists. In fact, it has not existed for more than a decade.

Once constrained by time and distance, then by the notion of a 24-hour broadcasting cycle, the public audience was free to tune in to their choice of news network, radio broadcast, print publication or website and receive "all the news fit to print," or broadcast as the case may be.[7] This media environment was predictable, constrained and cyclical. Easy to manipulate, and just as easy to ignore. After all, the average American adult attention span is short, and by the time the news cycle moved on, so had the viewers.

Recent analysis by marketing entrepreneur and blogger Kevin Rogers is an insightful commentary into this new state of the speed of the current news cycle. In his on-line article titled "The 24-Second News Cycle Effect on Your Biz," Rogers asserts traditional media, who are often constrained by national media laws or even event proximity, are now themselves citing more real-time information from the scene via individuals posting through platforms like Twitter. According to Rogers, "The 24-hour news cycle is now the 24-second news cycle. And diminishing right along with it is our tolerance for formality . . . while growing is our colossal desire for immediate gratification."[8] In this new era of instant information, individuals have come to expect immediate, real-time access to events as they unfold.

Military operations will continue to draw international attention. This paper will address the current media environment and how it replaced the traditional news cycle. By looking at current PA campaigns, both successful and unsuccessful, the analysis will discern usable strategies and tools available today. More importantly, the conclusion will propose a framework organizations and commanders can use to develop strategic end states and navigate through this environment effectively.

<u>Key Terms</u>

Because the digital world is fluid, definitions can be hard to pin down. This paper will define some of the terms relating to the electronic media environment as they relate to the concepts discussed here.

<u>Adversary</u>. The traditional definition of adversary is an opponent or opposition.[9] According to Joint Publication 1-02, *Department of Defense Military and Associated Terms*, an adversary is a party acknowledges as potentially hostile.[10] This group is not yet

categorized as an enemy combatant, and has the potential to be influenced toward a more favorable stance.

Enemy. An enemy is a person, nation, state, or other entity that desires harm or engages in antagonist activities.[11] An enemy combatant, likewise, is a person engaged in hostilities against the U.S. or coalition partners during armed conflict.[12]

Information Environment. According the Joint Publication 3-13, *Information Operations*, the IE encompasses physical, informational, and cognitive components. The physical dimension includes geographical locations as well as infrastructure and physical networks and platforms. The informational dimension involves raw data, interpreted knowledge, historical records, and primary and secondary sources of information and intelligence. Finally, the cognitive dimension addresses perceptions and beliefs affected by culture and background, the internal interpretations of the data and knowledge received in the informational dimension.[13] The IE is part of the commander's overall operational environment which encapsulates all of the conditions effect the commander's decision-making process or impact capability employment. For the purpose of this paper, the IE includes people, organizations, platforms, systems and data.

Information Operations. Information operations is the umbrella term used to describe the means of employing the nation's instruments of power inside of the IE. Information operations are designed to influence external foreign audiences and may include PA operations. According to Joint Publication 3-13, the military uses information related capabilities to gain operational advantages just as other military capabilities are used in other operational environments. Information operations are integrated with other

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lines of operation in order to "influence, disrupt, corrupt, or usurp the decision making of adversaries and potential adversaries while protecting our own.[14]

Media Environment. An environment is an area in which we operate. The media environment is a complex communication system with several facets. First, it encompasses a multitude of venues including the traditional broadcast outlets, television stations, newspapers and magazines, as well as the more informal arenas including the Internet, blogosphere, Facebook or Twitter feed, podcast or any other platform individuals use for information on a large scale. It takes into account the human dimensions of each venue which gives the media the opportunity to reach and inform the intended audience. According to researchers at New York University, the media environment includes the organization of ideas, culture, world view, psychology, and even linguistics. The media environment takes into account the "interactions of communications media, technology, technique, and processes with human feeling, thought, value, and behavior" of a given audience.[15] It includes all of the aspects that have potential to affect an operation in time and space. When talking about the media environment, this encompasses medium, delivery methods, technology and individual initiative. The media environment is as complex as any we find ourselves in.

The media environment is just a small part of the overarching military IE which also includes cyberspace. The media environment interacts with all three components of the IE, often simultaneously, and has its own physical, cognitive and data components.

According to Joint Publication 3-13, the physical dimension is "not confined solely to military nation-based systems and processes; it is a defused network connected across national, economic, and geographical boundaries."[16] The physical media

environment includes the people disseminating the information, the network infrastructure they are using and the physical platforms, whether broadcast channels or smart phones etc., where the communication resides.

The second component of the media environment within the military information domain is the cognitive dimension, which includes how the audience processes, understands, internalizes, and responds to the information. The cognitive dimension also includes subjective elements such as perception, judgment and decision making. It is the cognitive dimension of the media environment that will allow commanders to achieve the greatest effects from PA operations.

New Media. New media is the all-encompassing umbrella for digital media sources and all content related to the Internet. These platforms are agile and change rapidly. Rather than give them a static definition, for the purpose of this study, these types of media will be grouped under the new media umbrella. At the time of writing this thesis, new media platforms considered included blogs, texts, click-bait sites, pod-casts, Facebook-type social media sites, Twitter etc.[17]

Operational Level. The operational level of military activities links the tactical application of military forces to strategic objectives. Planners use critical thinking at this stage to design military strategies, campaigns, and major operations in order to achieve the desired end state.

Public Affairs. According to Joint Publication 3-61, *Public Affairs*, PA operations encompass all of the activities within the Department of Defense (DOD) related to the "proactive release of accurate information to domestic and international audiences."[18] These operations include internal command information, public information, and

community information activities. According to Joint Publication 3-13, PA is concerned with the release "timely and accurate information to the targeted audience through the most effective and efficient means possible."[19]

Command information relates to internal information directed to service members, civilian employees, dependents and retirees within the DOD. Public information includes media operations and social media engagements. Community information includes PA operations directed at building and maintaining community relations in and around the area of operations.

Self-Directed Information. Over the last few years, the web has fundamentally shifted toward user-driven technologies such as blogs, social networks and video-sharing platforms. Collectively these social technologies enabled a revolution in user-generated content, global community and wide-spread consumer opinions, now uniformly tagged as social media.[20] Self-directed information concerns how consumers receive, analyze, and internalize data, news and content in this information-saturated environment. Users no longer have to wait for, or rely on, major news networks to feed them information. Instead, they can peruse various traditional sources along with blogs, social media sites, and information feeds they deem credible to better understand the topics that interest them individually. Rogers defines this as a shift in consumer information expectations. "We discovered, as did frantic media moguls, that we no longer have to wait for some talking head to describe what's happening," wrote Rogers. "It turns out, [we] are keen enough to filter out nonsense and find the truth just fine."[21]

Social Media. Social media is defined as "a group of Internet-based applications . . . that allow the creation and exchange of user-generated content."[22] Social media

drives information sharing, collaboration, and human networking. Along with the increasingly mobile news audience, almost half of Internet-using adults report finding out news about politics or the government on Facebook alone.[23]

Strategic Level. According to Joint Publication 3-0, *Joint Operations*, strategy involves employing the diplomatic, informational, military and economic instruments of national power to achieve objectives. The Secretary of Defense translates national strategy into strategic military objectives which are used to plan operations within the theater.[24]

Tactical Level. At the tactical level, forces are ordered, arranged and employed during battles and engagements in order to achieve military objectives across the range of military operations.[25]

Key Questions

The Problem

Our understanding of how to strategically apply PA operations in the current media environment is incomplete. The methods people use to consume media are evolving, and the resulting self-directed IE is immense, complex, unpredictable, and instantaneous. The days are long gone when the 24-hour news cycle and network-directed public information were the only source of global information, as is the lead time available to respond to a crisis or contingency. Self-directed news consumption, individual narratives and global, interrelated ad-hoc networks augment, and in some cases replace, traditional news outlets with platforms that are as agile as the individuals they serve. DOD PA operations, however, are iterative, deliberate and increasingly ineffective when it comes to interacting with new, media-savvy masses. In terms of

creating an effective narrative, recruiting, achieving public influence and increasing operational impact, many of our adversaries currently navigate in this environment much more efficiently and effectively. The IE is of strategic importance to military planners and commanders at all levels.

The primary issue becomes how can the DOD, military planners and individual commanders use PA assets to compete with our adversaries in the new media environment and leverage self-directed and emerging media platforms strategically in order to achieve desired operational effects? Answering this question will require a review of current U.S. military PA practices compared to the practices of other state or military PA operations, paying close attention to which aspects are working and which ones are not. A review of recent case studies will help frame the current self-directed information phenomenon, not only in the U.S. DOD, but across other global state and military organizations as well. Finally, this research will look at the U.S. military PA structure and doctrine to determine whether or not operations can adapt to this media environment in order to gain a strategic advantage, answering the question "What are potential solutions that will allow the DOD PA to adopt, train for, and engage in these platforms in a real-time, relevant manner?"

Secondary questions to address include:

1. Is the media a strategic military environment rather than a tactical enabler, and can it be leveraged to our advantage?

2. What is the strategic role of military PA in the self-directed media environment?

3. How can PA disseminate messages effectively in this environment?

4. What are the implications of rapidly developing new media platforms and what

    are potential solutions that will allow the DOD PA to adopt, train for and

    engage in these platforms in a real-time, relevant manner?

Objectives

The goal of this work will be to ascertain the strengths and weaknesses of U.S. military PA operations in the self-directed IE and whether or not PA practitioners can impose strategic thinking and planning to synchronize information operation efforts across the information domain. This research will seek to uncover PA best practices within the framework of strategic military operations, and whether new methods of training, adapting and integrating new platforms will contribute significantly to U.S. PA strategy and execution. Finally, this paper will attempt to address the cost of failure in this arena, analyzing where the risk is worth the reward.

The first step in this process is to gain an understanding of the strategic media environment, ascertain what is currently working in the environment, recognize trends for the future and uncover usable strategies and tools available to PA today. More importantly, it will address ways in which organizations and commanders can operate in and navigate through this environment effectively.

Scope and Limitations

There is an immense amount of research and commentary dealing with the current media environment, social media and self-directed information activities. This study will not achieve a comprehensive account of the multi-faceted media environment or even its impact on society. Instead, it will define a narrow approach within the environment–PA–

and attempt to offer relevant solutions for those seeking to apply informational tools

strategically in this media environment. By increasing the reader's understanding of the

environment, context, tools and best practices, as well as uncovering operations that are

ineffective, it hopes to advance general understanding of an adaptable strategic approach

integrating PA into military operations in a strategically effective manner.

This study is limited by the lack of availability of primary source material

interviews and behavioral studies. Though attitudes and beliefs will be addressed in the

context of case-study analysis, the human dimension aspect of understanding will be

incomplete. This is not unlike the operational environment, however, unknowns will be

addressed through best practices and recent successes.

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CHAPTER 2

LITERATURE REVIEW

This literature review will discuss the material available on military PA and its

position in the current IE. The literature covered provides current context, an overview of

the basic tools and platforms and theories, and examples of recent military and PA

operations using these current approaches. There is a staggering amount of information

available on the current media environment including quantitative and qualitative

research, op-eds and scholarly reviews.

Categorizing these various sources provides background and context for the

material portrayed and outlines the author's arguments and assertions. The literature

review includes both primary and secondary sources, media reports and material obtained

from social media and interactive media sources including blogs and twitter feeds, thus

the credibility, quality and bias is variable. These sources are included to demonstrate not

only the character of the environment itself, but the perspectives of the participants who

engage in this type of medium every day. Because the media environment is so fluid, it is

difficult to establish industry-acceptable standards, credentials or even authority with any

given certainty. In order to better understand the nature of this problem, a broad range of

thoughts, ideas and theories must be taken into account.

Finally, military PA practitioners operate globally where the IE is defined by

various cultures, customs, regulations and perspectives. This review contains examples of

military operations in this fluid domain. While the cultural context should be noted, these

examples are included as a measure of effectiveness, an example of options available and

a comparison of tactics and techniques used in various relevant situations.

The subject of media, information, social collaboration, and self-directed news has been a hot topic over the past decade and this section categorizes the literature used into three basic subjects: (1) Understanding the environment, (2) Analyzing change, societal and cultural factors within the environment, and (3) Strategic and operational examples.

<u>Understanding the Environment</u>

The literature dedicated to defining and understanding the modern media environment is, by in large, comprised of books and journal articles researched and written by scholars and academics from the field. This body of work, taken as a whole, creates a foundation for understanding the language, norms and parameters of the environment and what we know as it stands today. The authors are not attempting to make a judgment concerning the topic and they take a wide variety of available media as well as individual participants into account.

As this is a military strategic studies document, the first material examined in this category comes from joint publication doctrine on the subjects of IO (Joint Publication 3-13), PA (Joint Publication 3-61), and strategic communication (Joint Doctrine Note 2-13). Doctrine provides a solid foundational overview of the current understanding of the military IE and how it fits in with strategic planning and operations. Joint Publication 3-61, *Public Affairs*, outlines PA operations in the military, categorizes media operations in the context of communicating with the American public. A new edition of this doctrine manual was published during the research phase of this thesis, and it made an important shift from emphasis on media operations to joining and interacting in the conversation by multiple means, including social media platforms and through influencers.[1] This doctrine

manual states PA puts "operational actions in context, facilitates the development of informed perceptions about military operations, helps undermine adversarial propaganda efforts, and contributes to the achievement of national, strategic, and operational objectives."[2] Strategic communication doctrine also addresses communication as a national imperative, striving to create favorable conditions for the U.S. government as it advances national interests.

Unlike the PA doctrine, Joint Doctrine Note 2-13, *Commander's Communication*, emphasizes streamlining and synchronizing communication efforts with the other national instruments of power including the diplomatic, military, and economic facets.[3] While this doctrine note addresses social media specifically, it mentions it as an aspect of operations to be aware of and respond to rather than a domain to operate in, stating "social media enables the rapid transmission of information and disinformation to domestic and international publics and communities of interest. Friendly forces should be aware of these social media tools, be able to identify adversary influence campaigns and operations that are developing, and provide a timely response."[4] Neither document attempts to address the tactical aspects of the informational environment or specifically how to adapt to change within the communication context.

It is important to note that all of these doctrinal references specifically address the adversary's use of the information domain as an element of concern. For example, Joint Publication 3-13, *Information Operations*, specifically points out "adversaries take advantage of the speed with which information travels and can often communicate lies or misleading information faster than we can communicate the truth."[5] The doctrine

recognizes a U.S. military vulnerability here, but other than to state the commander must assume some risk in communicating, does not offer a lot in the way of risk mitigation.[6]

Besides doctrine, other attempts to understand the environment have taken a quantitative approach. The Pew Research Center is the latest research institution to attempt to measure various aspects of the media environment in a study released March, 2015.[7] This report quantifies everything from advertising dollars spent across the news medium spectrum to the demographics of twitter users versus cable television viewers. Such a broad scope of data should be useful when crafting a picture of the current media environment as well as the key audiences operating inside of the domain.

Organizations dedicated to journalistic standards also have a vested interest in a formalized conceptualization of the media environment in which they operate. NewMedia.org and Journalism.org are two such institutions that have produced researched findings attempting to define new media and the new self-directed media audience.[8] Collectively, they define new media as a generic term used to define the relationships and interactions between digital technology and its users. Both agree there is no baseline definition for new media and the concept itself evolves as fast as the technology the term seeks to reference.[9] This becomes problematic when attempting to analyze the wider scope of the media environment but also highlights the fact that operating in this environment will be challenging as it doesn't remain static long enough to even define its boundaries.

The conclusion drawn from the literature defining the current media environment is threefold:

1. The content, methods of delivery, and audiences or end-users are constantly

    adapting and changing.

2. The preferred information domain is digital and near real-time.

3. The users and content providers are often one in the same, thus deriving

    credibility from the masses rather than from a centralized organization.

Based on these three criteria, this paper will use the following definition of the IE

throughout: The current IE as it pertains to the military PA practitioner is an agile, real-

time, digital domain with key terrain including digital delivery platforms and key-

influencer network hubs, actors including audiences and content providers which may be

one and the same, and credibility which is judged by the end-user rather than the

centralized information provider.

<u>Analyzing Various Tools, Products and</u>
<u>Use Within the Environment</u>

The working definition of the environment is a starting point that allows PA

practitioners to begin to understand how to frame their operations. The next step is to

understand the tools and practices available to navigate through the environment in order

to achieve a desired end-state. There are hundreds of web pages dedicated to analyzing,

categorizing, and recommending the use of product in today's media environment. The

literature reviewed in this category predominantly has an end-user in mind, whether a

marketer, journalist, or business professional. Thus, the subject matter in this category is

prone to opinion, bias and theorizing more so than the previous category. It is still a body

of work based on statistics and quantitative data, however, and it goes a long way toward

helping cultivate an understanding of why the media environment takes shape in the manner that it does, and what drives the audience to react in a certain way.

Military and Civilian Information Perspectives

Defense Media Activity is the organization across the DOD responsible for communicating news to an audience of millions internally across the U.S. DOD world-wide. Reviewing the sources and platforms Defense Media Activity uses will provide a broad scope of which communication platforms are standard across the services themselves. According to the Defense Media Activity webpage, the agency "presents news, information and entertainment on a variety of media platforms, including radio, television, Internet, print media and emerging media technologies."[10] Emerging media technologies, in this case, are represented, twitter, Facebook, blogs, Instagram, text and e-mail. This indicates the DOD recognizes the need to provide information across a wide range of tools available. Further research into Defense Media Activity literature reveals mobile access to information is one of the top current priorities listed by the Defense Media Activity's chief information officer. The DOD policy addressing this issue states two overriding principles: the first is warfighters want and need access to mobile data and the second is the DOD is working to integrate more of these digital applications while maintaining an appropriate level of security. This is the organization that will ultimately provide the approved tools and platforms necessary for military members, including PA officers, to navigate through the current IE. While the literature from the DOD does not make a judgment call on which platforms or applications are best used, the fact that the organization is addressing this access as one of its top priorities is telling.

Civilian organizations seeking to analyze the tools available in today's media environment are not as constrained in their assessments. Many, relying on the Pew Research Institute's report mentioned in section one of the literature review, point to twitter and Facebook as the top venues for news in today's age. *Wired* magazine, a leading industry publication on technology and innovation, comes to the conclusion that, not only do more users get their news from Facebook and twitter than any other source, but also that individuals who otherwise would not access this type of news at all are now informed by these sources as well, effectively increasing the news audience.[11] Other analysis focuses not only on which platforms audiences are using but how they are accessing those platforms. Journalism.org uses data to suggest more and more individuals pull news from their mobile devices, cell phones and tablets, than ever before.[12]

More than just where and how audiences are accessing news, the literature also delves into how audiences are treating this information. The American Press Institute, for example, published an article emphasizing the control of what information is disseminated to whom has shifted from the centralized formal news organization to the audience itself, coining the phrase "personal news cycle" as a replacement for the concept of the 24-hour news cycle.[13]

Technology Entertainment and Design lectures, or TED talks as they are more commonly known, provide a wide variety of opinions on the subject of the current media and IE. James Surowiecki, for instance, addresses the importance of the personal experience of the information, how individuals can interact with the news an important factor that determines the source individuals choose to use.[14] Seth Godin uses the TED Talks platform to address what he calls the "social media revolution," that he believes

ended mass marketing and gave individuals the power to link together to create global

change, though he asserts it may be at the expense of individual independence.[15]

Godin is not the only one to consider this method of content creation and sharing

on a global scale a form of social revolution. Some conclude this real-time, user-driven

media environment will make government more transparent, while others point to the

emergence of wide-spread social movements as events made possible by the Internet

Age. Some researchers, like those directing a social media experiment recently called

"Twitter, Facebook, and Ten Red Balloons: Social Network Problem Solving and

Homeland Security," assert the power of collective knowledge is so great we have only

just begun to understand the possible impacts it will have on problem solving, innovation

and global knowledge.[16] These authors agree on one thing–the IE has a powerful impact

on society and the way we interact with news, experience and each other. This concept

will become strategically important in later chapters of this study.

<p align="center">Strategic and Operational Examples</p>

There are many examples of how new media tactics can be put into practice in

both a military operational and civilian context. The literature available in this section

includes books written for public relations and marketing professionals outlining the

effective use of digital media platforms, articles covering military and civilian examples

of these practices put to use and new media examples, including blogs, tweets, posts,

podcasts, etc. putting to practice the media strategies they preach. Military publications

and journals have been covering the topic of social media and the new media

environment since at least 1995.[17] Joint Forces Quarterly, a scholarly joint military

publication, has publishes several articles defining the role of the IE strategic planning

and strategic communication, recently publishing an article on how to effectively

communicate effectively when the landscape of information is more of collaborative

dialogue than a two way conversation.[18] Another JFQ article written by Carmen Cicalese

goes as far as to state, "By conducting IO coordinated with PA, the JFC can effectively

communicate to the variety of intended audiences and affect adversary decision making

to maximize effects in the IE."[19] This quote singlehandedly recognizes the information

domain as a strategic environment, encourages planned effects in the environment and

assumes joint forces commanders can integrate PA activities into operations in order to

achieve success.

Even before "social media" came into play, a book written to address military

media management dedicates a large portion of its contents to media operations as on-

going influence operations and how the military must constantly engage in, address and

adapt to that environment in order to succeed. From a broader perspective, the success of

social media and propaganda as a recruiting tool for terrorist organizations has received

an abundance of literary attention recently. Articles and books addressing social networks

and their influence on human behavior claim, on one hand, the global availability ideas

actually creates a "delta of understanding" rather than unity[20] while espousing the

unstoppable potential of the current human interconnectedness.[21]

Detailed accounts of revolutions enabled by social media are numerous, including

international news media coverage of the "Arab Spring": actors, technology and political

impacts, Social Movements and the Internet Age,[22] and The Social Media Revolution,[23]

point to the possibility to instantly and inexpensively share personal experiences and

mass large, like-minded groups together as a driving force behind recent global social

change movements. This literature expands on the notion that new media platforms are merely tools to inform and shows specific trends where information which gains traction in these social networks can be a powerful motivator for action and change. Three specific examples of strategies in the IE will be discussed in detail as case studies in chapter 3.

This chapter outlined the pertinent literature available on the current IE, the types and application of tools available and recent examples from both a military and corporate perspective. The review covered scholarly and journalistic accounts, individual user-generated content and perspectives from a variety of both primary and secondary sources. The research covered in this chapter presented the broad spectrum of terms and applications that exist in the IE in order to establish a baseline of concepts for future chapters including the IE, the use of digital media applications and approaches from various actors within the environment. These ideas are instrumental to understanding how the current environment operates, as well as why a strategic change in our military PA approach is important. The next chapter will introduce the research methodology approach and how the analysis will be presented in order to provide a clear understanding of why the environment exists as it does today, why it is strategically important and how PA practitioners across the DOD can develop a systematic approach to engage in an agile and adaptive environment in order to achieve the desired strategic affects.

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[1] U.S. Joint Chiefs of Staff, Joint Publication 3-61, xiv.

[2] Ibid., A-1.

[3] U.S. Joint Forces Command Joint Warfighting Center, Joint Doctrine Note 2-13, *Commander's Communication Synchronization* (Suffolk, VA: USJFCOM Joint

Warfighting Center, December 2013), III-15, accessed April 24, 2016, http://www.dtic.mil/doctrine/notes/jdn2_13.pdf

[4] Ibid., ix.

[5] U.S. Joint Chiefs of Staff, Joint Publication 3-61, I-3.

[6] Ibid., III-5.

[7] Amy Mitchell, "State of the News Media 2015," Pew Research Center, April 29, 2015, accessed November 1, 2015, http://www.journalism.org/2015/04/29/state-of-the-news-media-2015/.

[8] Socha and Eber-Schmid.

[9] Ibid.

[10] Defense Media Activity, Home Page, accessed November 21, 2015, http://www.dma.mil/.

[11] Julia Greenberg, "Facebook and Twitter Really Are Where People Get Their News," *WIRED*, July 14, 2015, accessed September 9, 2015, http://www.wired.com/2015/07/facebook-twitter-really-people-get-news/.

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[15] Seth Godin, "The Tribes We Lead," TEDGlobal 2012, accessed September 15, 2015, http://www.ted.com/talks/seth_godin_on_the_tribes_we_lead.

[16] Manuel Castells, *Networks of Outrage and Hope: Social Movements in the Internet Age* (Cambridge, UK. Polity Press, 2012), 36.

[17] Douglas J. Goebel, "Military-Media Relations: The Future Media Environment and Its Influence on Military Operations" (Research Paper, Air War College, Maxwell

Air Force Base, AL, April 1995), accessed November 15, 2015, http://www.dtic.mil/docs/citations/ADA328815.

[18] William M. Marcellino, "Revisioning Strategic Communication through Rhetoric and Discourse," *Joint Force Quarterly* 76 (December 2014): 56, accessed January 9, 2016, http://ndupress.ndu.edu/Media/News/NewsArticleView/tabid/7849/Article/577589/jfq-76-revisioning-strategic-communication-through-rhetoric-and-discourse-analy.aspx.

[19] Carmine Cicalese, "Redefining Information Operations," *Joint Force Quarterly* 69 (April, 2013): 109-112, accessed April 23, 2016, http://ndupress.ndu.edu/Portals/68/Documents/jfq/jfq-76/jfq-75_52-57_Marcellino.pdf.

[20] Pankaj Ghemawat, "Actually, the World Isn't Flat," TEDGlobal 2012, accessed November 15, 2015, http://www.ted.com/talks/pankaj_ghemawat_actually_the_world_isn_t_flat.

[21] Charles Leadbeater, "The Era of Open Innovation," TED 2005, accessed November 15, 2015, http://www.ted.com/talks/charles_leadbeater_on_innovation.

[22] Castells, 12.

[23] Social Nety.

CHAPTER 3

RESEARCH METHODOLOGY

<u>Purpose and Overview</u>

The purpose of chapter 3 is to describe the research methodology used to answer the study's primary and secondary research questions. The findings from this study will identify ways U.S. military PA practitioners can contribute to strategic operations by shaping the self-directed media environment, including traditional media outlets and social media platforms as well as other emerging sources on news and information, in a strategic manner. This research will compare and contrast current operations in the IE and will make recommendations for PA approaches in the future.

In chapter 1, the proposal included the idea that information is an operational environment rather than a tactic and as such, PA practitioners in the military can learn to identify key terrain, actors, centers of gravity and avenues of approach in order to navigate through the domain successfully. It also addressed the challenges of this idea, including constantly shifting and adaptive technology, mobilized networks of users and the inability to control the content once it has been presented. The introduction also identified the key questions that will be addressed through this research and introduced the concept of self-directed news, which drives individuals toward personal sources and information they deem relevant rather than being "spoon-fed" information from a centralized source.

Chapter 3, Research Methodology, expanded on those ideas and outlined the framework used for analysis. In the end, the research will address the concept of self-directed news and various methods of operating in this type of environment. This is a

qualitative study that will use case study analysis to determine the relevance of treating

the information domain as an operational environment while conducting PA operations in

in a systematic way in order to create the desired effects within the environment.

The intent of this research is to probe deeper into the complexities and processes

related to PA and the IE. The three case studies selected provide situational data and

context which will help individuals gain a better understanding of today's IE and various

approaches that can be taken when developing PA operations. It will also examine the

strengths and weaknesses of each of these approaches, providing an idea of a way

forward that will result in more effective information strategies.

<u>Hypothesis</u>

Information today exists in an operational environment which includes key

terrain, avenues of approach, actors and the ability to cause and assess effects. Individual

end-users navigate through this environment in a self-directed fashion, determining the

credibility and legitimacy of sources of information and driving content based on

individual and collective assessments. Military PA practitioners can plan systematic

operations which analyze and shape this environment in order to achieve desired strategic

effects.

<u>Methodology</u>

The study proposes self-directed information gathering can effectively shape the

IE and strategic operations must achieve effects in this environment in order to succeed.

This theory is a way of understanding how to maneuver and adapt in the IE to achieve

strategic ends. Because this study seeks to determine the relationship between

information, beliefs and attitudes and behaviors, it is important to examine those relationships as they occur in the environment. In order to accomplish this type of analysis, this study will use literature reviewed for a baseline of terms and principles as well as case study analysis to highlight these causal relationships in pertinent situations. These actions and outcomes will begin to set the framework for recommendations moving forward. This case study comparison will involve both qualitative and quantitative data and will examine operational possibilities for successes and failures in the current IE.

Quantitative information, in this instance, will focus on the sheer numbers of actors collaborating and forming the personal networks driving self-directed news gathering as well as the number of data points, connections, shares, tweets, etc. affecting this network. It will also include calculations of time and distance in order to help measure the effects discussed. This type of quantitative data can indicate relationships that may not be self-evident from qualitative research alone.[1] The qualitative information presented will be useful for understanding the context, background, history and social environments which set the stage for each case.[2] The qualitative research will help describe the conditions that exist at the time of the analysis in order to help draw conclusions concerning the cause and effect of the methods used in each study helping to develop lessons learned and salient conclusions about which methods can and should be benchmarked for future operational use.

For the purposes of this study, the three relevant examples of PA operations in the IE, each with varying degrees of successes and failures will be examined: The Ukraine early in 2006, Israel and its information control evolution over the past two decades and

ISIS' success in recruiting and fundraising via social media. The case studies outline PA strategies and activities, successes in the IEs of each and the weaknesses of the public affairs approaches in each.

<center>Research Questions</center>

The primary research question is, "How can the DOD, military planners and individual commanders use PA assets to compete with our adversaries in the new self-directed IE and leverage emerging media platforms strategically in order to achieve desired operational effects?" The results will give insight into how DOD PA operations can adapt to the self-directed IE in order to gain a strategic advantage.

Secondary research questions will also be addressed in the course of the study as outlined below:

1. Is the media a strategic military environment rather than a tactical enabler, and can it be leveraged to our advantage? Understanding the definition of IE as presented in chapter 1, including the physical, informational and cognitive components, is the first step toward addressing this question. Further research will recommend ways to leverage tools and platforms inside of this environment in order to support strategic operators.

2. What is the strategic role of military PA in the self-directed media environment? Public affairs in the context of military operations were discussed in chapter 2 as well. Several Joint Publications exist which provide the military doctrine for the implementation of PA. This study looks to provide context for these operations in the IE and how to best integrate them strategically.

3. How can PA disseminate messages effectively in this environment? This

question focuses more on the tactics and best practices of PA. By reviewing

and comparing case studies, research in this study should point to effective

practices for PA practitioners looking to operate in this environment in a more

effective manner.

4. What are the implications of rapidly developing new media platforms and what

are potential solutions that will allow the DOD PA to adopt, train for and

engage in these platforms in a real-time, relevant manner? This question looks

to predict activities and outcomes in the environment in order to develop

training and systems of approach that will provide the most effective results.

In the end, this research project will provide a framework for operating in an

environment that, by its very nature, is constantly shifting and adapting to cultures, social

norms and technology. The literature review in chapter 2 outlined current research and

thinking, while a comparison of the case studies will provide relevant examples of those

theories and ideas in practice. Finally, this chapter will argue that lessons learned in other

countries operating in the same IE can be adopted and effectively used by military PA

practitioners in the United States.

<p style="text-align:center"><u>Case Study Introduction</u></p>

The three case studies included in this study include the Ukraine's use of self-

directed media to counter its restrictive state media environment, ISIS' use of self-

directed media in regards to recruiting, and the impact of self-directed media on IDF PA

operations. These selected case studies will provide operational examples of navigation

various aspects of today's informational environment. Analysis will identify lessons

learned as well as best practices for practical strategic application by military public relations operators. The literature review identified sources, tools and key players in the self-directed media environment, provided theories on causes and effects within the environment and explained the evolution of information, content producers as well as information consumers. These factors will be addressed again in conjunction with their roles and effects throughout the case studies. The three aspects which will be specifically compared in each study include the evolution of the IE, the strategic response within the environment in each case and the outcomes, strengths and weaknesses of the chosen approach. A comparison between the three will also be useful for identifying any patterns, whether effective or not, in strategic approach and effect.

<p align="center">The Role Self-Directed Information in Ukraine's
2004 Orange Revolution</p>

The Ukraine was selected as an example of self-directed information and revolution, a specific incident of the people, unhappy with or distrustful of the formal sources of information available, turn to their own devices to create and follow news. This will provide an interesting glimpse into the dichotomy of the information being provided by the state versus the information being provided largely by networks of informal or unsanctioned sources.

<p align="center">ISIS, Social Media and Recruiting</p>

ISIS was selected as a case study because of its effective and growing status as a non-state actor with an information momentum able to cross economic classes, borders and ethnicities, although it does have the religion of Islam as its strong unifying foundation. This case study will provide a counter view to the civilian directed IE

explored in the Ukraine case study and a formal state-sponsored information strategy which will be addressed in the final case study on Israel.

Israel and the State Media Environment

Israel has been selected as a case study on the use of information in a strategic manner as a state-military sponsored campaign. It investigates the Israeli Defense Forces (IDF) and their approach to PA and media relations as it has evolved over the past decade. The IDF currently combine traditional and new communication methods with some degree of information control.

Conclusion

Chapter 3 introduced the study's qualitative methodology and presented three case studies from differing state communication approaches. The points identified will be arranged in the following chapter to describe the relationship between the IE, self-directed information gathering and content creation and the role of PA in that process. The results of this study will take the analysis of the existing IE and apply strategic thought to the practical application of PA operations.

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[1] Kathleen Eisenhardt, *Building Theories from Case Study Research*, vol. 4 (The Academy of Management Review, 1989), 538.

[2] Ibid.

CHAPTER 4

ANALYSIS

Chapter 3 described the research methodology used to answer the study's primary and secondary research questions. The three case studies, the Ukraine, ISIS and Israel, present a qualitative research approach in order to analyze the information gathered. Chapter 4 contains an overview of the IE concept followed by an analysis of the strategies and tactics presented through the case studies. This will provide contextual information in order to frame the current strategic environment and outline processes related to DOD PA. It will also examine the strengths and weaknesses of various approaches in order to reach conclusions for effective information strategies.

Addressing the Information Environment

As described in chapter 3, the research hypothesis is outlined below:

Information today exists in an operational environment which includes key terrain, avenues of approach, actors and the ability to cause and assess effects. Individual end-users navigate through this environment in a self-directed fashion, determining the credibility and legitimacy of sources of information and driving content based on individual and collective assessments. Military PA practitioners can plan systematic operations which analyze and shape this environment in order to achieve desired strategic effects.

Defining the Strategic Information Environment

According to Joint Publication 3-61, *Public Affairs*, "The information environment is the aggregate of individuals, organizations, and systems that collect,

process, disseminate, or act on information."[1] The IE is complex and has many competing elements, both technological and human, and not only spans the globe but provides limitless global networks and connections. In order to operate effectively in the IE, commanders must understand the complexities inherent to such a fluid domain.

Joint doctrine provides a simplified view of the strategic IE that includes a cognitive dimension, a physical dimension and a data-centric dimension as referenced in Figure 1 below. These broad categories, broken down into components, contain beliefs and attitudes, audiences, content creators, events, delivery methods and the messages and ideas.
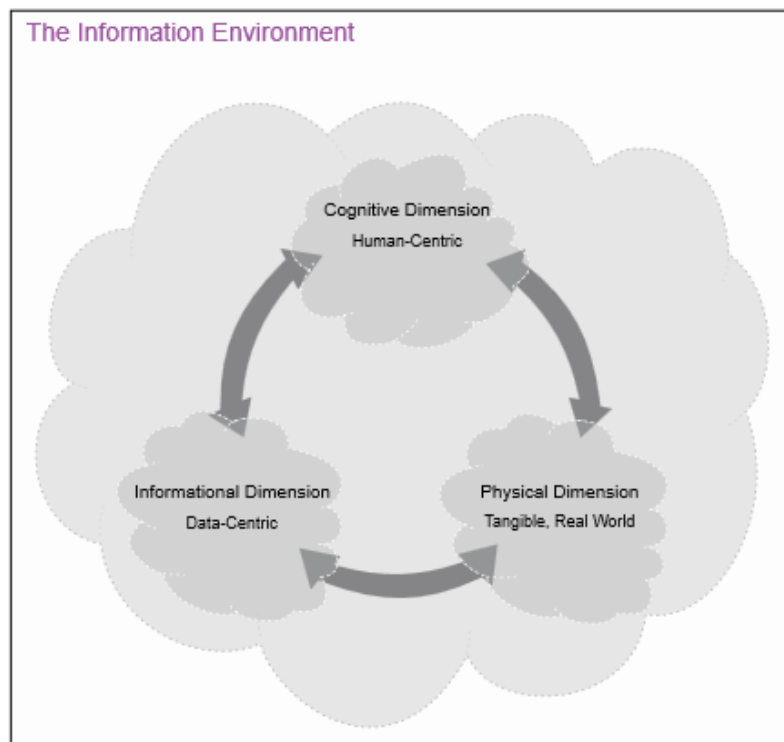

Figure 1.   The Information Environment

Source: Department of Defense, Joint Publication 3-13, *Information Operations* (Washington, DC: Government Printing Office, November 2015), I-2.

Though the arrows in the diagram indicate influence on one another, the model does not visually represent where these elements intersect and overlap with one another. The IE is not made up of several independent spheres of operation, but rather complex, interlocking systems that are driven be esoteric ideas including culture, experience, religion, popular opinion and belief. Each element impacts every other element in a manner that can be difficult to identify, much less manage. While joint doctrine outlines a fundamental starting-point for describing the IE, reality demonstrates a much more complicated picture. For the purposes of this study, the IE considered will include the actors, audiences, delivery systems, dominant narrative, messages, desired effects, and obstacles along with the cognitive, physical and data dimensions.

<div align="center">

Case Study Analysis: Information Approaches in
Divergent Information Environments

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The three case studies which follow include the Ukraine use of self-directed media to counter its restrictive state media environment, ISIS' use of self-directed media and its successes with recruiting, and the impact of self-directed media on IDF PA operations. These selected case studies will provide operational examples of navigation various aspects of today's informational environment. Analysis will identify lessons learned as well as best practices for practical strategic application by military public relations operators. The literature review identified sources, tools and key players in the self-directed media environment, provided theories on causes and effects within the environment and explained the evolution of information, content producers as well as information consumers. These factors will be addressed again in conjunction with their roles and effects throughout the case studies. The three aspects which will be specifically

compared in each study include the evolution of the IE, the strategic response within the environment in each case and the outcomes, strengths and weaknesses of the chosen approach. A comparison between the three will also be useful for identifying any patterns, whether effective or not, in strategic approach and effect.

<div align="center">

The Role Self-Directed Information in Ukraine's
2004 Orange Revolution
</div>

The Ukraine was selected as an example of self-directed information and revolution, a specific incident of the people, unhappy with or distrustful of the formal sources of information available, turn to their own devices to create and follow news. This will provide an interesting glimpse into the dichotomy of the information being provided by the state versus the information being provided largely by networks of informal or unsanctioned sources.

The Information Environment. The traditional media environment leading up to the Ukraine Orange Revolution in 2004 is best categorized as highly restrictive. In 2003, despite constitutional rights to the contrary, state censorship and heavy-handed dealings with the press were prevalent according to independent global watchdog group Freedomhouse.[2] The governmental interference in media affairs garnered international attention. According to a statement by U.S. Senator Ben Nighthorse Campbell, Co-Chairman, Commission on Security and Cooperation in Europe at the time, reports concerning the media environment in Ukraine leading up to the 2004 presidential elections there indicated authorities interfered with the news media by intimidating journalists, dictating events which could be covered and pressured venues into applying self-censorship.[3]

Although the world has seen this social digital movement in revolutions multiple times since, including in Egypt, Spain and even the #OccupyWalstreet Campaign in the United States,[4] the Ukraine Orange Revolution was one of the earliest examples illustrating the concept of civilians using privately or commercially organized digital networks for vital news information when more traditional sources of information were not trustworthy. This new phenomenon of consumer-driven information creation and consumption in the Ukraine was born out of necessity as individuals redirected their information gathering efforts toward social media, blogs and networks of cell phone texts in an attempt to avoid being force-fed state-sponsored messages.

  <u>The Strategic Response - Reaching the Right Audience.</u> Perhaps one of the most important factors that led to the success of this digital movement in the Ukraine was reaching the right audience with the appropriate influencers.[5]

  In this instance, journalists themselves were the main catalysts of change in an information environment they felt was too restrictive to allow for the truth to be exposed. In a time where less than 13 percent of Ukraine's had access to the Internet, and online approach would be challenging if they were to reach the percentage of the population necessary to effect change. According to a report of the events conducted by researcher Joshua Goldstein, the individuals targeted by this type of digital information would need to be well-connected to the rest of the population in order to spread the messages by other means. The journalists were savvy enough at the time to realize this, however, and they successfully targeted well-connected individuals early on including investigative journalists, human rights lawyers, entrepreneurs, and students.[6]

Creating the Conversation. Humor and satire were a natural outcropping of an information movement aimed at exposing a semi-authoritarian regime.[7] Much like political cartoons captivate audiences in the West, this new-found digital space for poking fun at those in power while exposing potentially serious human rights and election fraud issues as an undercurrent kept the conversation moving. According to Goldstein "it was this creativity that helped many Ukrainians join the political conversation and feel like the discussion related to them."[8] Satire taken from Internet posts and disseminated via cell phones and word of mouth created a buzz, fueled group protests, and drew in a large audience who may not have otherwise been moved by the information at all.

The Opposition Response. Despite attempts to quell media dissention, the state was ineffective in addressing this new type of news dissemination. Because legally the Ukraine recognized online websites and message boards and peer to peer platforms rather than formal media outlets, many of the restrictions that haunted traditional news outlets at the time did not apply. By the time the government officials caught on to what was happening, they were unable to achieve an effective counter to the strong citizen-fueled discussions already occurring. Most of the state-sponsored response to this digital Self-directed news gathering phenomenon took the form individuals paid to post counter messages and disrupt popular message boards.[9]

Effects, Strengths and Weaknesses. By 2008, the European Union had invested more than two million Euros in project "Development of Media Skills" aimed to strengthen journalism practice in Ukraine by overhauling the university curriculum.[10] Although the situation improved slightly in the decade to come, the press has never

gained autonomy or independence. In August of 2015, Ukraine's Interior Ministry

banned the broadcast of 14 Russian channels, arguing that the country's information

space had to be protected from Russia's "propaganda of war and violence." The

authorities have also detained some pro-Russia journalists, raided the offices of the pro-

Russian newspaper *Vesti*, and barred many Russian journalists from entering the country.

The new government established an Information Ministry that critics fear will ultimately

attempt to impose censorship.[11]

ISIS, Social Media, and Recruiting

ISIS was selected as a case study because of its effective and growing status as a

non-state actor with an information momentum able to cross economic classes, borders

and ethnicities. Although it does have the religion of Islam as its strong unifying

foundation. This case study will provide a counter view to the civilian directed IE

explored in the Ukraine case study and a formal state-sponsored information strategy

which will be addressed in the final case study on Israel.

The Information Environment. ISIS began as an insurgent operation and

developed into a "powerful state-like actor that is reshaping the Middle East.[12] Their

unexpected military success has been attributed by many to their successful strategic use

of social media including Facebook and Twitter. By, broadcasting graphic acts of

violence and surprising victories across the net ISIS is able to evoke emotional responses

and obtained more than 46,000 Twitter Followers.[13] Drawing people in visually and

connecting them to a community of like-minded ISIS supporters translates into funding,

recruits and global reach that would be unattainable by any other means. According to a

recent study by the Brookings Institute, "ISIS has been able to exert an outsized impact

on how the world perceives it, by disseminating images of graphic violence …while using social media to attract new recruits and inspire lone actor attacks."[14]

ISIS is not the only terrorist organization to employ the use of social media, Al Qaeda, Al Shebab and Hamas all have a presence in the online-world, but ISIS efforts have been more successful, possibly due the integrated use of multiple media options. ISIS has been able to exploit the self-directed media trend, pointing their growing number of followers to digital and print versions of magazines, news broadcasts, blogs and websites. Some commenters note "ISIS not only employs social media to spread its messages and recruit followers, including Westerners, but also to empower its supporters to take part in that process."[15] Followers contribute content, share across domains, interest groups and even continents and reinforce ideas in these interconnected networks. This is an extremely inexpensive way to recruit and fundraise. The technology is available globally and the information crosses multiple boundaries previously more difficult to address on such a large scale including language, economic class and culture.

This is an example of an organization with a singular ideologue, using self-directed media to attract users and supporters based on a religious and emotional appeal. ISIS integrates both traditional sources of information including broadcast and print materials, together with electronic media to motivate and empower a population's growing tendency toward self-directed media.

The ISIS Consumer-Driven Strategy: Recruiting and Image. ISIS' use of media, in all of its forms, is designed to gain attention, create and enhance its image as a legitimate state actor, fundraise and recruit supporters.[16] By presenting itself as a dedicated religious organization engaged in social activism, ISIS can frame its extreme

acts of violence as a religious and social imperative–fighting against the evil West who has caused so much upheaval. ISIS reinforces these ideas with powerful visuals including short YouTube videos, called "Mujatweets," showing ISIS members as freedom fighters, distributing food and playing with children while fighting to ensure a better way of life for its supporters.

Efforts to call followers to join the fight include videos, print articles, electronic media operations and even popular songs and anthems.[17] All of these options work in conjunction to encourage supporters to share, engage and further the ISIS media operations. The environment of self-directed media makes it possible to ISIS to control the narrative, leading followers further and further into the world of ISIS propaganda, effectively shutting out other perspectives, especially those from the West.

Controlling the Narrative. Along with its message that all good Muslims should migrate to the established caliphate, the "holy land" created as ISIS gains territory in the Middle East, these benevolent visuals become powerful motivators for devout Muslims from diverse regions of the world and all walks of life. James Farwell, author for the International Institute for Strategic Studies, describes the ISIS media strategy as adaptive and sophisticated.[18] By appealing to the target audiences' sense of religious duty, the group's narrative portrays ISIS as "an agent of change, the true apostle of a sovereign faith, a champion of its own perverse notions of social justice, and a collection of avengers bent on settling accounts for the perceived sufferings of others."[19] The dominant narrative, whether factual or not, says ISIS is strong, powerful and the fulfillment of religious prophecy, therefore legitimate and destined to succeed. ISIS is advanced technically as well. Cellphone networks, social and mainstream media, slick

print, photographic and video productions all have global reach as their message spreads throughout the world.

The Opposition Response. Reactions from formal state agencies and governments include cyber-related activities like physically shutting down certain Twitter and Facebook accounts, to counter videos using ISIS' own footage to highlight the life of violence it promotes. According to the International Institute of Strategic Studies, the government in Baghdad has a limited ability to disseminate messages throughout the country due to heavy, centralized control.

U.S. military cyber operators have used the ISIS predilection to electronic communication to locate and track key leaders and headquarters, seize funds and shut down transfers and even break up human trafficking rings, proving digital communication during military operations can be a "double-edged sword." In addition, using individual testimonials to discredit ISIS claims have also had demonstrable affects against ISIS recruiting efforts, proving the truth will eventually catch up to the narrative.

Effects, Strengths and Weaknesses. ISIS' success in the realm of communication is measured in its ability to raise money and recruit members. Though these numbers on both ends are decreasing recently, the group's ability to use powerful and graphic images to appeal to emotions was, at least initially, extremely successful. It is possible that the message of inevitable, prophetic victory may have ultimately hurt their cause, however, because as the caliphate began to lose territory, their recruiting successes began to decline as well.

The point remains, however, ISIS proved emotion is a powerful motivator when it comes to communication, and visuals are more effective at achieving this level of

emotional reaction than text alone. The downside to such a lateral campaign is quick loss

of control. While fighters on the ground can post their victories as a rallying cry, so too

can the disenfranchised who are no longer caught up in the wave of the movement. When

individuals post realities from the source that are in stark contrast to the shining future

ISIS promises, the savvy digital audience pays attention. Self-directed information means

individuals are free to explore both sides of any narrative, and inconsistencies become

apparent quickly. Opposition groups can take the very same footage of violence and

victory used to recruit warriors and employ it just as effectively to deter them.

<center>Israel and Defense Media Control</center>

Israel was selected as a case study highlighting the use of information in a

strategic manner as a state military-sponsored campaign. The IDF have had both open

and controlled approaches to PA and media relations at various times over the past

decade with differing results. The IDF currently combines traditional and new

communication methods with degrees of information control based on the situation and

perceived thread.

The Information Environment. Israel's information landscape is characterized in

the context of a nation state continually in conflict with its neighbors. This tension creates

a relationship between Israel's' military officials, PA representatives, the civilian

population and the press that is unique to other democratic states.[20] According to

researchers, Israel Defense Forces and the Jewish State are subject to intense propaganda

campaigns in the region which include influences from Western, European and Arab

media. As of 2009, there were more foreign press correspondents per square kilometer in

Israel than in any other country in the world–making events with media interest highly visible on the global scale.[21]

Unlike the conflicts the United States has seen over the past decade, Israel's wars are existential–threatening the very existence of the State of Israel. The relationship between the military and communication, whether with the press or internally, was censored and heavily controlled for decades. Recent years have seen a shift, in policy if not in action, toward more openness, and in 1988, the Israeli Supreme Courts ruled censorship is only entitled when access will result in "real harming of state security."[22] This didn't lead to an open media environment, however, and instances of "bad press," false reports from the IDF PA offices and doubts from the civilian population creates a tension between IDF, their military PA offices and civilian press representatives. A poll in 2009 found fewer than 19 percent of the population trusted IDF' press releases and when mobile phone use became wide-spread it gave members of the press and civilians alike the opportunity to circumvent restrictive IDF communication and photography rules, creating a new problem for military officials used to having control of the information flow.[23]

The Strategic Response-The IDF React. The IDF has tried several avenues of approach when it comes to media and public relations. Attempting to control information and footage in real-time in during turn of the century conflicts along the Gaza Strip had disastrous results. The PA offices were quickly overwhelmed with the sheer volume of images and reports coming from the area and could not review or release it in a timely manner. Reporters and press quickly circumvented the cumbersome state-established release authority rules despite threats of sanctions. Likewise, as attempt to bring military

photographers along during operations to provide footage in context of the operation led to the death of one IDF videographer, resulting in the often quoted mantra from the IDF's press office, Dover Tsahal, "what price are we willing to pay for an image?"

In contrast, during the 2005 Israeli withdrawal from the Gaza Strip, media was allowed open access to IDF evacuation operations and the press office ramped up communication to the public early and often. The controversial withdrawal went more smoothly than expected and the potential public relations nightmare never materialized. This came after an attempt to tightly control the coverage of earlier evacuations in the region ended in public outrage, not over the evacuations themselves but over footage of handcuffed reporters barred from releasing footage.

The people turn to technology. As in the study on the Ukraine self-directed IE, in the absence of trustworthy state news, the people will turn to personal networks of sources they deem to be more accurate. Digital footage unfolding in real-time is powerful and unstoppable, and without a state-sponsored narrative or context, the footage will take on a life, and an audience of its own. In this case, personal footage spread rapidly and ultimately impacted future information policies used by the IDF.

The IDF response. One report on the state of Israeli military PA puts it best stating "The IDF doesn't do hearts and minds; instead it tries to set the 'rules of the game.'"[24] This is more about influencing an adversarial audience–communicating Israel's deterrent capabilities–rather than a public civilian audience. This could be an influential difference in the way Israel approaches media relations as opposed to the other two case studies examined earlier in this paper. This approach also leaves room for media tactics not previously explored in the scope of this research, including allowing false reports of

military atrocities to spread unhindered, keeping the adversaries guessing as to exactly how far the IDF is willing to go.

The traditional methods of information gathering and sharing have only recently been integrated, in a limited manner, with the digital age. The army adopted practices from more modern means of communication in 2009, creating a YouTube channel including feed from drones and interviews with individual soldiers on the ground. This new program has been successful in feeding the public information otherwise unavailable, though it does not satisfy the journalistic clamoring for open access.

Effects, Strengths and Weaknesses–The Danger of Frustrated Media. Military operations often result in jarring images of violence and destruction. Especially taken out of context, these images can have immediate and visceral influence on audiences, both intended and unintended. When mobile phone footage of IDF operations sent from civilians or press members outside of the IDF's intended release authority it created an international uproar. This negative perception of IDF operations may have been prevented if Israel had set the conditions to state and frame the narrative ahead of time. In the absence of information, people will take what they have and form their own conclusions. The IDF's odd mix of traditional and new communication methods are more well received than the military's previous attempts to control all sources of information, but media outlets and individuals continue to fill in the missing information gaps with their own version of the truth.

Information's Key Terrain

Key terrain, in military terms, is "Any locality or area, the seizure or retention of which affords a marked advantage to either combatant."[25] In the case of the IE, the key

terrain would be the narrative and the attitudes beliefs of the target audience. According to *ATP 5-01 Army Design Methodology*, the narrative is "a story that gives meaning to individuals, objects and events."[26] The narrative is dominant story on which a culture or society bases subsequent beliefs and ideas. As global communication becomes easier and more wide-spread, control of the narrative takes on strategic importance for any combatant. Joint Publication 3-61*, Public Affairs*, addresses the narrative environment as multiple, coexisting and conflicting narratives where defeating unfavorable narratives is difficult or even impossible.[27] "The ability of an organization to influence audiences in this environment has become complicated, and traditional assumptions that have in the past shaped engagement strategies are often no longer valid."[28] In order to gain control of this narrative key terrain, PA, along with other IO activities should be designed to "gain superiority over the adversary's narrative, diminish its appeal and followership, and supplant it or make it irrelevant."[29]

Public affairs doctrine identifies at least four target audiences: command or internal information, public information, media, community and government relations and IO. Although the lines defining this division of information terrain are blurring, there is still value in segmenting the information arena in this manner. Command or internal information is the internal sphere where commanders and military have a direct impact. Soldiers, Sailors, Airmen, Marines, Coast Guardsmen, civilian employees, contractors and their respective family members all make up a part of the internal information audience. This segment of the information terrain is doctrinally considered unrestricted, friendly territory, although friendly does not always mean in agreement. Key leaders,

commanders and PA practitioners can move through this environment with speed and ease, and can be directive and prescriptive with their message.

The command IE is not obstacle free. Barriers including apathy, information saturation and competition for resources, are just a few of the impediments planners must face when looking to achieve strategy effects in this environment.[30] The public information domain is the area outside of the internal information sphere that can be reached by PA assets directly. Local and regional citizens surrounding military installations, individuals affected by military operations in the area, political entities, coalition partners and their communities and other individuals interested in military affairs but not directly employed by governmental agencies are examples of external publics.

The external public is key to local, regional, national and even international military relations. Without public support the military finds it difficult to recruit qualified candidates, receive funding from congress and maintain the size and force structure necessary to fulfill its national mission.[31] Obstacles include activists lobbying against military systems or operations, competition for funding among other federal entities and a slow bureaucratic communication system that makes it difficult to communicate in this fluid domain.

One of the most important aspects of strategic PA is controlling the narrative in this external environment. By communicating the mission and purpose of the military early and often the military can ensure a greater level of support as operations arise. The external public is savvier when it comes to information and communication than even ten years earlier. By creating individual content and using social and networked platforms,

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key influencers in the external environment can crossover into the media environment, effectively operating in both spheres simultaneously.

Media involves professionals and platforms that disseminate news and information. The term media is broad but its application in the realm of information is relatively consistent across the board. Members of the media gather, analyze, and report information to a desired audience through a variety of platforms. In the context of an IE, media is relatively formal, either public or private, with an intended audience and an ongoing presence. Media can be a conduit to promulgate information, or it can be an information provider, coming to conclusions and reporting on events previously unknown. While this portion of the environment may be the most visible, it is also one of the most difficult portions of the IE to navigate. Because the media in this context has a duty to an established audience, effects in this domain may be difficult to influence.

<u>Information's Avenues of Approach</u>

Based on the composition of the environment, what are the best methods to deliver the right message to the intended audience in the most effective manner to achieve the strategic effects desired? These methods of information delivery can be equated to axis of advance. The Flow of information Theory Two-Step Flow Theory developed by sociologists Katz and Lazardsfeld, delineates a 'two step' information path. The first step is the direct path between mass media and the general public and the second path is among elite opinion makers who strongly influence the views of the general public. This theory helps delineate how a relatively small group of activists and citizen journalists helped create a distinct IE that challenged the narrative presented by state sanctioned media.[32] This model may be even more relevant in today's congested IE

where key influencers may have more credibility to a target audience than even mass media outlets.

<p style="text-align:center">Strategic Information Operations, Actors, and End Users</p>

The strategic message from military PA comes from the diplomatic segment of society–politicians, the state department and national level DOD members. This overarching strategic framework must be translated and communicated down to the lowest levels, molded into operations plans and tactical applications in order to have the greatest effect on the environment as a whole. There are two points of tension within this process. First, civilian strategic direction does not often directly translate into military strategic direction, and often the solution is a combination of both. Second, the capacity for the adversaries' message to influence organic audiences is often overlooked when considering a strategic communication direction.[33] DOD doctrine defines strategic communication as "focused U.S. Government efforts to understand and engage key audiences to create, strengthen, or preserve conditions favorable for the advancement of U.S. Government interests, policies, and objectives through the use of coordinated programs, plans, themes, messages, and products synchronized with the actions of all instruments of national power." But despite that seemingly conceptual definition, military doctrine describes IO largely as a set of capabilities rather than a strategic enabler.

Military operations outside the realm of IO also impact the IE and are worth considering when developing a strategic approach. Security operations, civil affairs, special forces operations and training all impact the host nation and civil populations in the region and work in concert with IO to create a complete narrative. This reality

suggests, in order to achieve strategic effects, IO must be considered in conjunction within the full range of military operations from the beginning of operational planning.

Finally, one popular phrase says "the enemy gets a vote," and the adversary audience is also a crucial component of the IE when developing a strategic assessment. The adversary audience is one of the most obvious places PA and IO overlap, as IO seek to influence the adversary and PA seeks to counter enemy propaganda.

Strategy and Public Affairs

> When we cannot explain our efforts clearly and publicly, we face terrorist propaganda and international suspicion, we erode our legitimacy with our partners and our people, and we reduce accountability in our own government.[34]

The concept of strategic communication, or viewing communication as a strategic asset, is not new. Strategic communication is a common term for integrated, purposeful communication. The DOD officially recognized Strategic Communication as a formal entity in the 2006 Quadrennial Defense Review Strategic Communication Execution Roadmap. In this document, strategic communication efforts include understanding and engaging key audiences to "create, strengthen, or preserve conditions favorable for the advancement of U.S. Government interests, policies, and objectives through the use of coordinated programs, plans, themes, messages, and products synchronized with the actions of all instruments of national power."[35] The report goes as far as to say communication efforts of this magnitude must be a whole of government effort synchronized with coalition partners including efforts from PA, IO, Department of State public diplomacy, psychological operations and combat camera to name a few.

Joint PA doctrine acknowledges the changing IE, but continues to emphasize developing key themes and messages as the solution. "It is imperative for PA personnel

to rapidly develop themes and messages to ensure that facts, data, events, and utterances are put in context. Coordination and synchronization of themes and messages take place to ensure unity of effort throughout the information environment."[36]

<p style="text-align: center;">Conclusion</p>

Chapter 4 described the current and fluid nature of the IE and outlined several components of that environment that should be considered when including information in a strategic plan. The existing joint PA doctrine provides direction and guidance on themes and messages and the importance of shaping the conversation and introduces the commander's communication synchronization process as whole of government approach to achieve a unified effort. While certainly continually relevant, the existing focus on themes and messages leaves room for additional focus on narrative, strategy, audience interaction and the nature of the environment you wish to reach. Chapter 5 will provide an overview of the results of the research concerning the initial primary and secondary research question and conclude with a recommended model of approach for the environments addressed in the chapter 3 case studies using the PA resources and methods outlined in chapter 4. Chapter 5 will also propose a method of framing strategic PA IO in any environment, whether friendly or adversarial.

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CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

Commanders must provide guidance on how actions support strategic
communication, rather than how strategic communication supports actions.[1]
— U.S. Joint Forces Command,
Planner's Handbook for Operational Design

This research explored how military PA can be viewed and used as a strategic

enabler in addition to its role as a tactical tool. The analysis promotes the idea the IE is as

layered and complex as the physical environment and proposes operations can maneuver

through this environment in a purposeful manner. A new version of Joint Publication 3-

61, *Public Affairs* was released during the research phase of this project. The shift in

thinking from the 2010 version of the doctrine and the updated version includes a greater

emphasis on interacting inside of the conversation. The new publication not only

addresses the IE, but also emphasizes the strategic importance of PA, especially in

regards to impacting the IE as it relates to public support both at home and abroad.[2]

Doctrine, however, is sufficiently vague to allow for flexibility and adaptability.

While this ambiguity provides freedom of movement in the field, varying levels of

understanding concerning the capabilities and effects PA contribute to the frustration and

sometimes ineffective results from PA efforts. While there is a growing sense the military

could do better with IO procedures in general, there is yet to be a consistent roadmap for

what successful proactive strategic PA looks like. Many of our current adversaries seem

to address the IE as the main effort, gearing operations toward influencing public support

and shaping local, regional, national and even international opinions prior to, during and

following other types of military operations. This was clear in all three of the case studies presented.

This study also explored the idea of self-directed news, defined as an individual's ability to sort through numerous networks, outlets and individual accounts globally searching for information they believe to be credible. This concept highlights and the importance of influence and influencers within the environment. The potential for even tactical PA operations to reach and shape audiences on a global scale is real. In contested environments where counter-narratives are competing for attention, controlling the narrative becomes increasingly important as does identifying key influencers. In order to be effective, commanders must have a robust understanding of the cultures and nuances of the intended audience as well as potential second and third order effects of IO. The task for military professionals is to begin to think of PA strategically and identify with the IE as they would any piece of physical terrain. Information operations, including PA, conceived as the main effort in which operations in all domains shape and define the environment can lead to behaviors which help achieve the desired military end state, not only in the IE, but in every environment. The remainder of this chapter will outline lessons gleaned from the research and case study analysis that can have both general applicability to military PA and strategic implications for commanders. Finally, this section will address areas for future research.

The primary question posed at the beginning of this research was, "How can the DOD, military planners and individual commanders use PA assets to compete with our adversaries in the new self-directed IE and leverage emerging media platforms

strategically in order to achieve desired operational effects?" The analysis in chapter 4

provided three significant conclusions which are outlined below.

<u>Conclusions</u>

The Information Environment is Integral to Strategy

The initial research hypothesis proposed today's IE includes key terrain, avenues

of approach, actors and the ability to cause and assess effects. Additionally, one of the

secondary research questions was, "Is the media a strategic military environment rather

than a tactical enabler, and can it be leveraged to our advantage?" Case study analysis

concluded there are various axis of approach within this environment that will achieve

desired strategic effects. In an article in *Foreign Policy Magazine*, Chairman of the Joint

Chiefs of Staff at the time, Admiral Michael G. Mullen, presented a critical view of U.S.

government communication efforts in Afghanistan saying "the lines between strategic,

operational, and tactical are blurred beyond distinction. This is particularly true in the

world of communication, where videos and images plastered on the Web –or even the

idea of their being so posted –can and often do drive national security decision making."[3]

According to the recently released joint PA doctrine, "official information can

help create, strengthen, or preserve conditions favorable for the advancement of national

interests and policies and mitigate any adverse effects from unofficial, misinformed, or

hostile sources."[4] Thus military operations shape the IE and IO shape the operating

environment. In order to be successful in both, commanders must first understand the IE

in the context of visualizing the problem, before and end state has even been determined.

In a recent article in Military Review, author Steve Boylan points out "the court

of domestic public opinion, driven by modern communications, can have a dramatic

impact on military decisions, generally at the strategic and operational level but also down to the tactical level. Information conveyed to the public has the capacity to push us just as quickly out of war as it can push us in."[5]

In a *Joint Forces Quarterly* article titled "Strategic Communication is Vague," Christopher Paul states "all of the actions and utterances of representatives of the U.S Government contribute potential information and influence, and those activities can be harnessed and synchronized in support of national or theater strategic objectives."[6] Information and communication, however, are not entities among themselves. Much like leadership skills must be applied at all levels across all domains, IO effects are integrated into operations across the board. The ends, ways and means of the information domain involve narrative space, technology and communication platforms as well as policies and rules of engagement.

The IE as a whole is as diverse and multi-layered as the physical domain. There are adversaries and partners, enemies and instigators. There are avenues of approach, obstacles, cultures to consider and friendly and enemy courses of action to analyze. Outcomes in the IE can have direct, tangible effects in the cognitive and physical environments. Conflict can both begin and end in the IE regardless or sometimes even in spite of what is happening in the physical domain. U.S. military key leaders recognize this capability gap in the force, so the time is ripe to make significant changes to the way we think and act in the information domain.

PA: National in Character, International in Scope

Geography matters. "Different people in different places with different culture, traditions, civil society and infrastructure will act differently online."[7] They will also

react differently to news and information, rate different sources credible or unreadable and assess reports differently depending on the "who, what when where and why" of the information delivered. This is perhaps the heart of the case studies. No two populations are the same when it comes to the way they transmit and receive information in an environment, and if there is not a "right" approach, there is at least a wrong one. In order to communicate effectively, the communicator must understand how the intended audience interprets ideas based on cultural and societal contexts. As doctrine suggests, PA members must become consumers of intelligence, as well as a producers, in order to achieve the best strategic picture of the environment.[8] This expertise goes beyond cultural awareness into the behaviors, beliefs and attitudes of the audience.

When looking at the strategic role of military PA in the self-directed media environment, research shows objectives should be strategic, proactive and effects-based. Planning should consider the whole IE, including friendly, adversarial and neutral players, and synchronize with all IO. Research points to two means of creating an effective information effect even in unfamiliar cultural surroundings, visual imagery and emotion.

Visuals and graphics have almost immediate effects on an audience and can change beliefs, attitudes and assumptions quickly. Pictures and videos are powerful regardless of when or where they originated. Many attribute the success of ISIS recruiting campaigns, for example, to the slickly-produced videos and images that flood their territories, social media sites and print news venues. Conversely, according to one researcher, "Public opinion turned sharply against Israel as emotive images of dead children being pulled from the rubble of Israeli attacks saturated the regional media."[9]

IDF lost public support, in large part, due to the imagery coming out of the operations they were conducting.

Public affairs members have the training and technology needed to produce powerful imagery. Combat Camera and visual information assets also exist to assist the commander in communicating his vision and achieving the end-state. Strategic direction can help shape these visual activities, unifying the images with the words and deeds used in the IE to create a powerful, unified narrative.

Emotion is also a powerful motivator in any culture. Whether its humor, loyalty, pride, anger or even nostalgia, using emotionally charged information tactics takes a PA campaign from inform and educate to motivate. In the end, while the tenants of PA call operations to be informative, timely and truthful, they should still have an effect on the audience. Whether the desired end state is simply knowledge of an event or support for military members in the area, messages that are instantly forgotten do nothing to further the IE. Images flooding the airwaves from early operations in the war in Iraq provided a visceral example of this concept. Suddenly Arab populations across the Middle East became emotionally charged. According to Hussein Amin, the senior editor of Transnational Broadcasting Studies, "The image of an American flag draped over Saddam Hussein's statue was transmitted to tens of millions of Arab viewers and contributed to a sense of the humiliation of their Arab brothers and their fears of American imperialism." Amin points to this incident as an example of global information, "One soldier makes an individual gesture and an entire region watches in astonishment."[10]

Finally, in regards to the global nature of information, regardless of the culture or the region, people increasingly demand to be heard, and according to at least one journalist, "the message they are sending is loud and clear: 'Lose the tie, drop the double-speak and give it to us straight.'[11] Talking points, when used, need to be relevant to the topic at hand and provide useful information, not flowery, contrived language. Better yet, they should fit into the character constraints of a Twitter feed and should link to relevant imagery and other sources of information on the matter, allowing the people to choose the breadth and depth of information they want to consume from various sources throughout traditional, social and Internet sites. Speeches, in turn, should not be condescending but to the point, informative and brief incorporating real-world examples and emotional appeals in order to connect with the intended audience.

People want instant, credible, relevant access to information and if you don't provide it, they will go elsewhere to obtain it. The ever-expanding availability of technology information sources and global networks and instant transmission means PA operations have to be faster, or at least as fast, as the other influencers engaged in the conversation, or it risks being shut out altogether.

<center>Control of the Information Environment is a Competition</center>

Information operations, including PA, compete for scarce resources in the military, space in the commander and staff visualization process, and attention in the IE. To be successful in both aspects, PA must be relevant to the strategic end state. "The main effort for winning the battle of wills, particularly in operations characteristic of irregular warfare, will likely occur in and through the IE. If the joint force is to compete favorably in the competitive IE, there must be synchronization of all communication

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efforts with operations."[12] The environment is saturated, not only with outlets, networks, messages and ideas, but with competing narratives as well.

Take, for example, one civilian model of the IE as it relates to marketing. The Conversation Prism (Figure 2) was a model developed to visually depict the sources and interactions available to reach an audience in the US market social media landscape. The center of the model presents the ends and desired behaviors (listening, learning, adapting) and the outermost ring represents the various ways suggested (comments, question and answer sessions, social networks, music etc.) The arrayed rainbow in the middle, then, contains the most popular delivery methods, or means, to use to reach the end state. There are hundreds of options in the social media arena alone. In order to be effective in this type of constantly shifting, overcrowded environment PA practitioners need to understand the relationships between the ends, ways and means available to them in their current area of operation. Understanding will lead to more effective and efficient operations, allowing friendly operations to gain greater leverage and speed when competing with both unconstrained adversaries as well as noise cluttering the environment.

Figure 2.   The Conversation Prism

Source: Brian Solis, "The Conversation Prism," JESS3 (2008), accessed September 19, 2016, https://conversationprism.com/.

<u>Recommendations</u>

The desired end-state of PA should begin at the strategic level. There are four key

recommendations to help commanders and planners achieve that result:

First, pay attention to doctrine, and train to the new standards. The IE has always been an important domain for military strategists, planners and tacticians. Doctrine related to the Information domain is constantly being updated and the current joint publication for PA contains many of the ideas expressed in this paper. For example, of the four PA functions listed, two of them, Provide Advice and Counsel to the Commander and Lead Staff Communication Alignment, were two items directly addressed in the results section of this chapter, (1) become part of the commander's visualization process, and (2) synchronize communication efforts across the range of military operations.[13]

Additionally, this joint publication, and its companion Joint Doctrine Note 2013, *Commander's Communication Synchronization*, specifically mention using research, intelligence and analysis to form a comprehensive understanding of the IE in order to "improve responsiveness to public interests, articulate potential unintended consequences of planned actions, and quickly identify perceived disparities between actions and words."[14] These points indicate the doctrine has adapted to the IE. Commanders and staff's, however, continue to struggle with adaptation and implementation at all levels.

Second, evaluate the environment first, not once your information operations have been established. The first task any PA should undertake when approaching a new IE is research. This entails not just the standard media monitoring executed in most PA offices, but identifying attitudes and issues as well as patterns of communication in the environment as well. Only after the commander, staff and IO practitioners, including PA, have a complete picture of how the intended audience receives, processes and shares

information, as well as the dominant narrative in the area, should planning begin to develop themes, messages and methods of delivery.

Third, focus on results, end states and effects, not the messages themselves. The dominant thought at this stage should be, "What can I do to reinforce and enhance the narrative?" Admiral Mullen said, "We've come to believe that messages are something we can launch downrange like a rocket, something we can fire for effect. They are not."[15] The traditional view of PA is often characterized as a tactical implementation tool as characterized in the satirical cartoon below (Figure 3). Public affairs is more than a useful tool in times of crisis or a loudspeaker to communicate a commander's vision to the masses. Instead, like other military functions, PA should focus on achieving results which move the operation forward with a desired end state for the IE in mind.

Figure 3.   In Case of Emergency

Source: Facebook, "U.S. Air Force Public Affairs Professionals," accessed April 24, 2016, https://www.facebook.com/groups/582936821841683/search/ ?query=break%20glass.

Fourth, synchronize all information activities across the joint force, including public affairs. Do it early in the visualization phase and constantly update operations in the planning and execution phases. This concept is so important that there is an entire joint doctrine note, Joint Doctrine Note 2-13, dedicated solely to a commander's communication synchronization. It states because our adversary may have an advantage when it comes to communication unconstrained by hierarchical processes and moral and legal tenants, U.S. and partner communication must be unified in order to "create,

strengthen, or preserve conditions favorable for the advancement of national interests, policies, and objectives."[16] This unification involves not only aligning messages across forces, partners and government agencies, but aligning words with actions as well. The synchronization process should nest operations with the broader national strategic narrative and as mentioned in the section above, should focus on the effects necessary to reach a desired end state.

<div align="center">One Way to Get There</div>

In an effort to provide a concrete manner in which to apply these principles immediately, the Information Environment Analysis Matrix (Figure 4) outlines a framework for commanders and PA practitioners at every level to think about and address the IE in a relevant, audience and effects oriented manner. A broad description of the model follows with a more detailed application process found in Appendix A. As the results suggest, the model starts with understanding the environment, effects and outcomes. The quad chart contains four domains: The Threat Quadrant can include propaganda in a foreign operation or simply an adverse or counter narrative in day to day operations. The Human Information or Cognitive terrain quadrant includes all of the relevant information about the cognitive dimension of the target audience, cultural aspects, beliefs, attitudes, and desires as well as how they receive and process information. The Physical Information Terrain quadrant contains an analysis of the currently available information as well as the delivery systems used. This quadrant includes traditional media monitoring activities as well as an analysis of the platforms available to the audience, the most likely methods of delivery and physical information capabilities such as the availability of internet or state-run versus private media

operations. The final quadrant is the Information Influencers domain. This quadrant

contains all relevant information about the dominant narrative and the key influencers

already operating in the region and any key publics or actors relevant to the situation.

Once complete, this quadrant should provide an adequate picture of the IE. The

next step is to determine the desired end state within the context of that environment. Is

your desire to inform an audience of an upcoming exercise in order to stave off noise

complaints? Or is it to create the conditions for joint forces to move freely through a town

without hindrance from the local population? Once the desired overall end state is

determined, is will be helpful to outline the effects that will be required in each quadrant
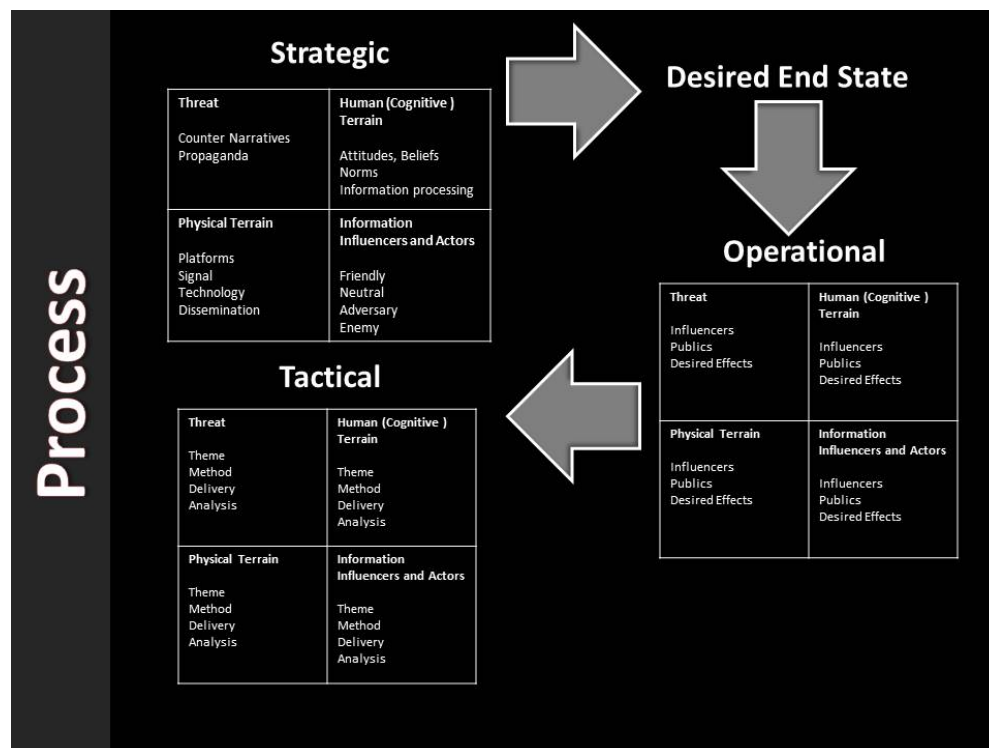
in order to achieve those ends.

Figure 4.   Information Environment Analysis Process

Source: Created by author.

Taken together, the completed quad chart including effects and the overall desired end state are the first two pieces of the puzzle needed in order to develop the ways and means of IO. There are multiple sources of Information Operation Capabilities available to commanders in order to achieve results, PA is just one. Because this model relies heavily on prior research and proper problem framework, once complete, by synchronizing the capabilities available and operating with a unity of effort results can be achieved faster and assessment conducted more consistently, allowing communicators to act swiftly and adjust to the changing environment.
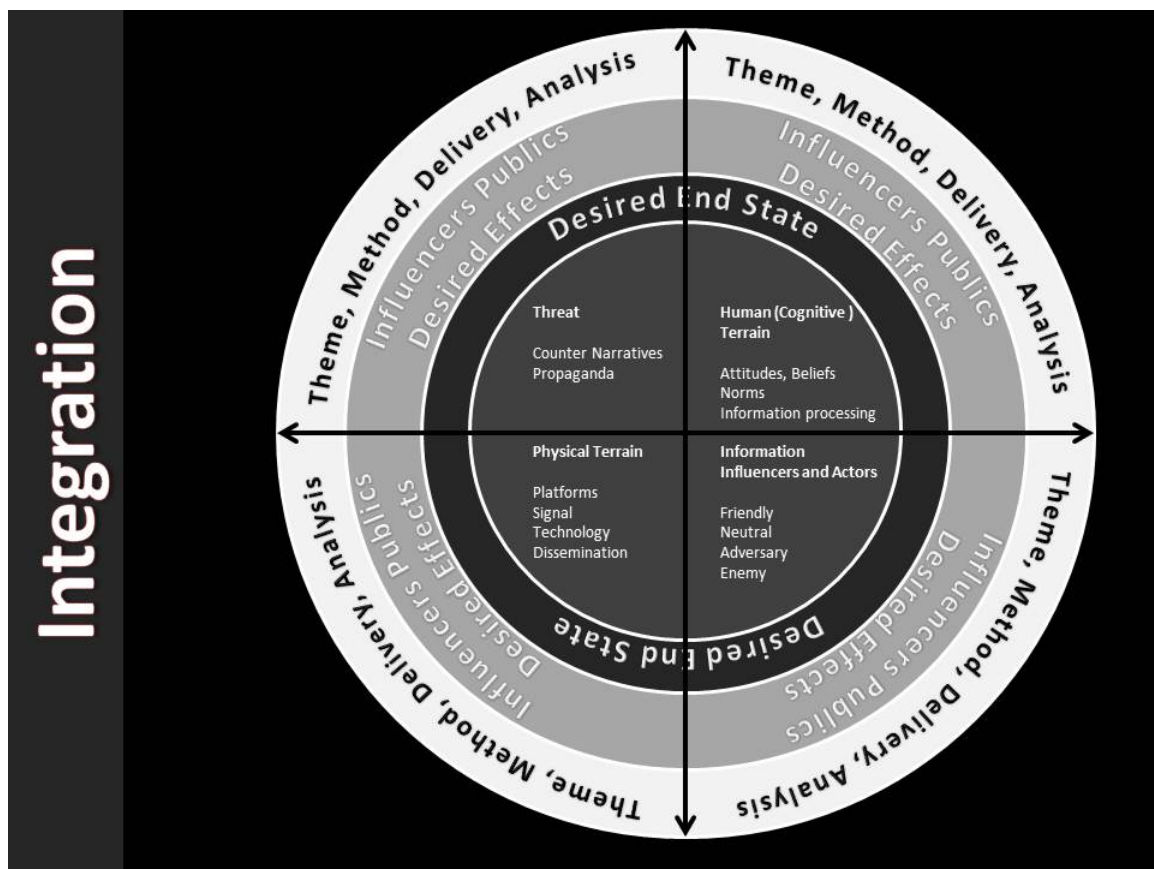

Figure 5.   Information Operations Integration

Source: Created by author.

Of course this model is not the only way to achieve a desired end-state in PA, but it is a way to start the conversation about how PA can be integrated into strategy and ultimately achieve the desired end state. By exploring these options together, hopefully PA can become more responsive to commanders needs and more effective in the various environments they operate in as a team.

There are a number of areas this study did not assess that could be used for further research. The dynamic nature of the IE can only be properly addressed if the key communicators involved have proper training and understanding of new and emerging developments in technology and trends in networking and self-directed news. Creating a more fluid and adaptable training environment as well as enlarging current programs which rely on civilian-sector training and education may help bridge the gap between new capabilities and PA's ability to react in the IE. The potential for social media as a revolution in military affairs is also an emerging concept that may benefit from further research. Further insight to social media as a collection of interrelated networks and systems may provide patterns and trends useful for predicting behaviors in the environment. Another area for future research is how to better integrate a whole of government concept into our communication efforts. Even within the services, communication capabilities are compartmentalized, making it difficult to align efforts with one another much less with other governmental and partner agencies. A framework outlining how communication organizations can unify efforts and learn from one another would be beneficial to our national narrative as a whole. Finally, a study of the methods used for evaluating the IE and the proper framework for doing so would be useful in creating a better understanding of the terrain and how to maneuver through it.

This study, while not exhaustive, sought to bring to light the strategic value of PA and to create a useful framework for integrating that concept into strategic planning. The main objective, in the end, was to start a conversation among PA professionals, planners and leaders in the military about how to improve the overall effectiveness of PA in regards to military operations. It will only be successful if the ideas presented here are taken and discussed, refuted or revised by practicing members of the profession seeking to further the cause of timely, effective communication. If the debate on how the information domain can be leveraged for strategic effects, and how organizations can better adapt to the IE is brought into the mainstream strategic planning process that will be half the battle won.

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[2] U.S. Joint Chiefs of Staff, Joint Publication 3-61, III-1.

[3] Michael G. Mullen, "Strategic Communication: Getting Back to Basics," *Foreign Policy*, accessed April 24, 2016, https://foreignpolicy.com/2009/08/28/strategic-communication-getting-back-to-basics/.

[4] U.S. Joint Chiefs of Staff, Joint Publication 3-61, I-2.

[5] Steven Boylan, "Public Opinion: A Center of Gravity Leaders Forget," *Military Review* (September 2015): 93-105, accessed November 15, 2015, http://www.read periodicals.com/201509/3799450741.html.

[6] Christopher Paul, "'Strategic Communication' Is Vague, Say What You Mean," *Joint Force Quarterly*, no. 56 (January 2010): 10-13, accessed April 23, 2016, http://oai.dtic.mil/oai/oai?verb=getRecord&metadataPrefix=html&identifier=ADA515164.

[7] James Jay Carafano, *Wiki at War: Conflict in a Socially Networked World* (College Station: Texas A&M University Press, 2012), 270.

[8] U.S. Joint Chiefs of Staff, Joint Publication 3-61, iv.

⁹ Nathaniel B. Davis, "The Decisive Role of Operational Time and the Information Environment in the Israel-Hezbollah War of 2006" (Master's thesis, Command and General Staff College, June 2014), accessed September 10, 2015, http://oai.dtic.mil/oai/ oai?verb=getRecord&metadataPrefix=html&identifier=ADA611622.

¹⁰ U.S. Joint Chiefs of Staff, Joint Publication 3-61, I-4.

¹¹ Rogers.

¹² U.S. Joint Forces Command Joint Warfighting Center, Joint Doctrine Note 2-13, I-7.

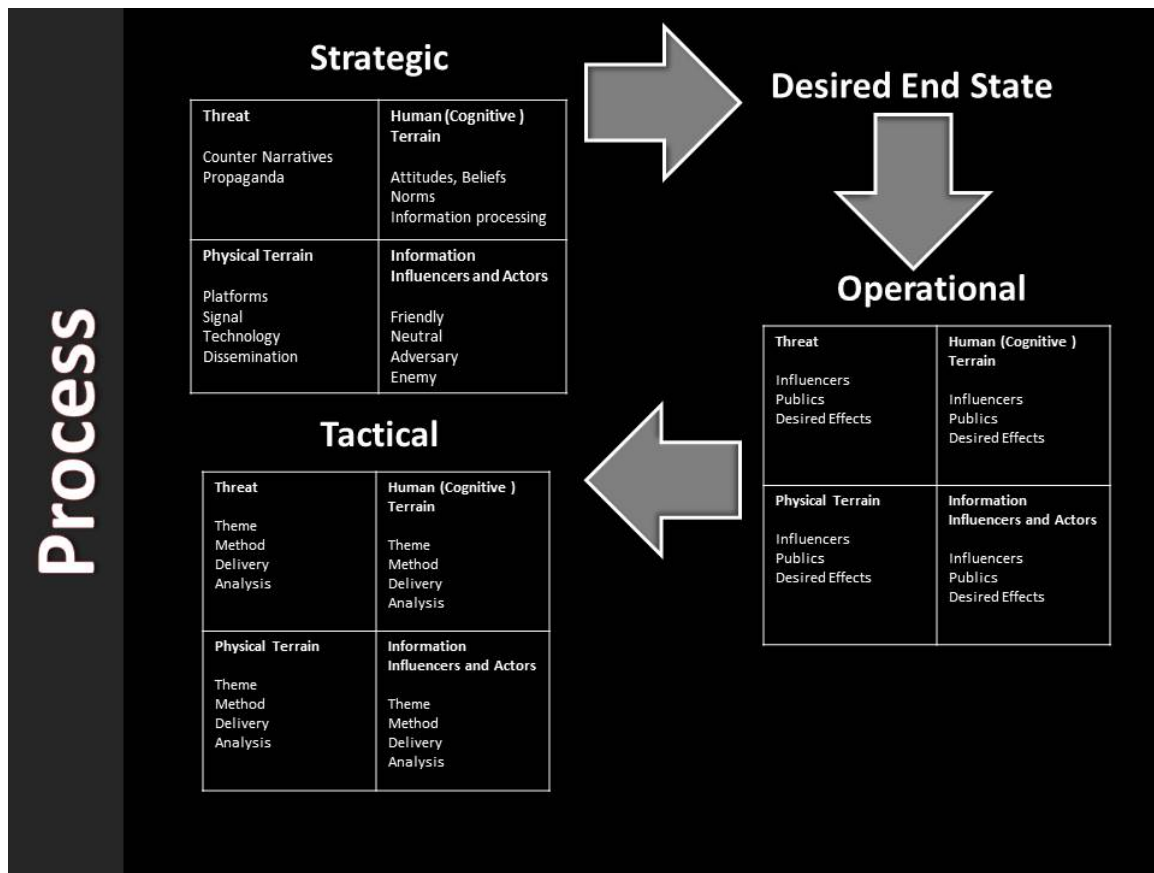¹³ U.S. Joint Chiefs of Staff, Joint Publication 3-61, III-1.

¹⁴ Ibid., III-2.

¹⁵ Mullen.

¹⁶ U.S. Joint Forces Command Joint Warfighting Center, Joint Doctrine Note 2-13, I-9.

APPENDIX A

APPLYING THE INFOMRATION ENVIRONMENT MATRIX

The potential for even tactical public affairs operations to reach and shape the information environment on a global scale is real. In contested environments, those where friendly information operations are competing with those of an adversary, controlling the narrative becomes increasingly important as does identifying key influencers. In order to be effective, commanders must have a robust understanding of the cultures and nuances of the intended audience as well as potential second and third order effects of public affairs. The task for military professionals is to begin to think of public affairs strategically and identify with the information environment as an area of physical terrain. Information operations, public affairs included, conceived as the main effort in which operations in all domains shape and define the environment can lead to behaviors which help achieve the desired military end state, not only in the information environment, but in every environment.

Information Environment Analysis Process

The Information Environment Analysis model outlines a framework for commanders and public affairs practitioners at every level to use to address the information environment in a relevant, audience and effects oriented manner. The model starts with understanding the environment, effects and outcomes. The first quad chart begins at the strategic level which could be a service level, department, major command, joint task force or other similar organization. This quadrant contains four domains: The threat, which can include propaganda in a foreign operation or simply an adverse or counter narrative in day to day operations. The Human Information or Cognitive terrain quadrant includes all of the relevant information about the cognitive dimension of the

target audience, cultural aspects, beliefs attitudes and desires as well as how they receive and process information. The Physical Information Terrain quadrant contains an analysis of the currently available information as well as the delivery systems used. This quadrant includes traditional media monitoring activities as well as an analysis of the platforms available to the audience, the most likely methods of delivery and physical information capabilities such as the availability of internet or state-run versus private media operations. The final quadrant is the Information Influencers domain. This quadrant contains all relevant information about the dominant narrative and the key influencers already operating in the region and any key publics or actors relevant to the situation.

Information Environment Analysis Process Strategic Matrix

Once complete, this quadrant should provide an adequate picture of the information environment. The next step is to determine the desired end state within the

context of that environment. Is the goal to inform an audience of an upcoming exercise in order to stave off noise complaints? Or is it to create the conditions for joint forces to move freely through a town without hindrance from the local population? Once the desired overall end state is determined, is will be helpful to outline the effects that will be required in each quadrant in order to achieve those ends. This next step involves operational-level information operations planning including identifying themes, determining lines of operations and beginning to conceptualize a means of evaluation. The tasks in this quadrant should be completed at both the strategic and operational levels, as they will likely have a slightly different focus. These first three pieces, the strategic and operational quad charts and the overall desired end state, provide the first pieces of the puzzle needed in order to develop the ways and means of an information operations plan including public affairs activities.

Operational

Threat	Human (Cognitive) Terrain
Influencers Publics Desired Effects	Influencers Publics Desired Effects
Physical Terrain	**Information Influencers and Actors**
Influencers Publics Desired Effects	Influencers Publics Desired Effects

Information Environment Analysis Process Operational Matrix

NOTE: Notice the attributes of each quadrant are the same. This does not mean the information is the same, however. For instance, if the threat in the upper left quadrant is an alternate narrative to the preferred one, who are the influencers promoting that counter-narrative? Who are the specific publics affected? What do you want these publics and influencers to do? In the Human Terrain quadrant, how does the intended audience receive information? Which methods are most effective? Do you want your messages to dominate the information environment or merely provide an alternate source of information? These types of question help develop the ends and ways of communication activities

There are multiple sources of information operation capabilities available to commanders that can achieve results in the information environment; PA is just one. Because this model relies heavily on prior research and proper problem framework, once complete, synchronizing the capabilities available and operating with a unity of effort will achieve results faster provide more consistent assessment measures, allowing communicators to act swiftly and adjust to the changing environment.
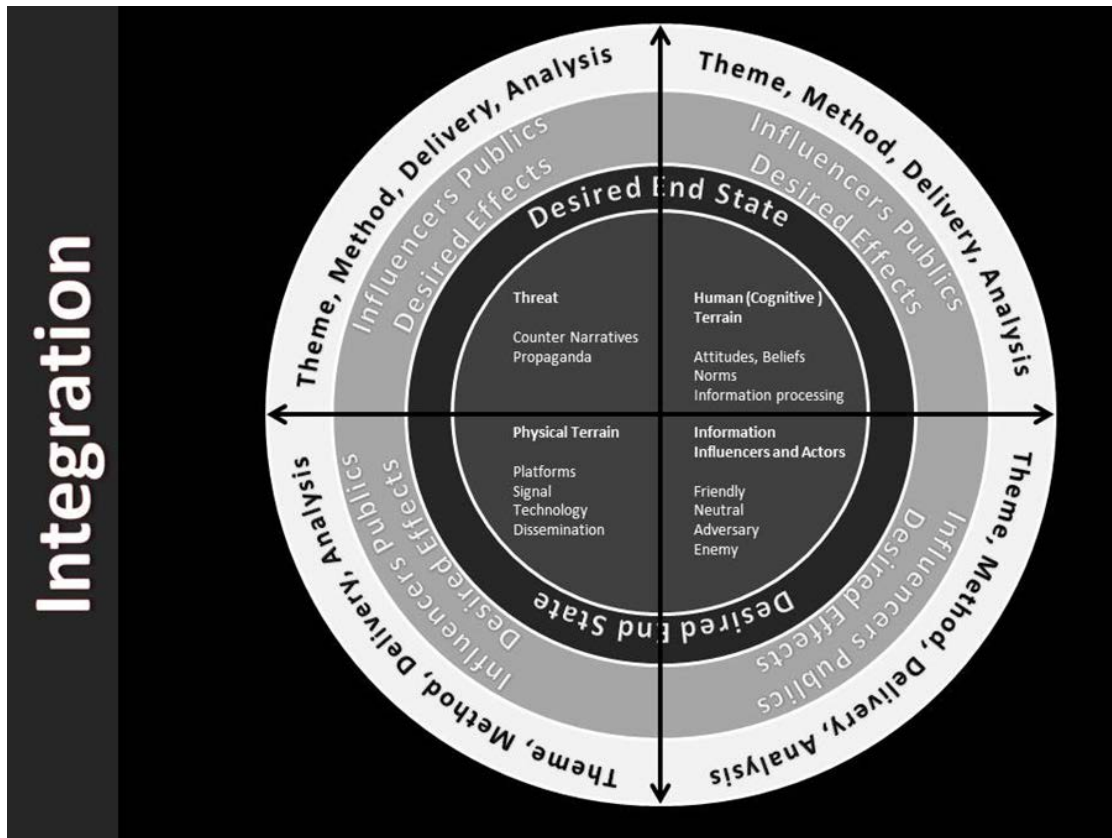
Tactical planning should occur concurrently at all levels, there will be information effects desired at each stage. Tactics are determined once the strategic and operational information environments are completely understood and the desired end state is clear. The Tactical quad chart takes the themes developed and applies them to information related capabilities, delivery methods and analysis according to each quadrant.

Information Environment Analysis Process Tactical Matrix

This type of comprehensive environmental analysis not only allows information operation to achieve unity of effort, but it identifies desired effects and methods of analysis as well. When integrating these operations, it is helpful to think of these activities as concentric rings, starting in the center with an analysis of an environment and mobbing out toward themes, methods of delivery and assessment only after the inner rings have been completed. Efforts in each quadrant should be consistent with those of every other quadrant and across the range of information related capabilities. This will

achieve one singular picture of the environment and a strategic roadmap for achieving

desired effects down to the tactical level.

Information Analysis Integration

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